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**State of Wisconsin
Governor Scott McCallum**

TO: **Economic Support Supervisors
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Training Staff
Child Care Coordinators
W-2 Agencies**

FROM: Amy Mendel-Clemens
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BWP/BIMA OPERATIONS MEMO

No.: 02-46

File: 2499

Date: 7/15/2002

Non W-2 ☐ **W-2** ☒ **CC** ☐

PRIORITY: High

SUBJECT: **INCORPORATING THE INFORMED
CHOICE PHILOSOPHY INTO W-2**

CROSS REFERENCE: Wisconsin Works Manual Chapters 1.1 and 1.6

EFFECTIVE DATE: Immediately

PURPOSE

This memo informs W-2 agency staff about efforts underway to remove language from the W-2 Philosophical Statements and W-2 Policy Manual that emphasizes a philosophy of "light touch" and "diversion" and replace it with a philosophy of "informed choice".

BACKGROUND

As part of the evolution of the W-2 program, the emphasis has shifted away from a "light touch" and "diversion" philosophy. This is reflected in many of the more recent changes in policy, the W-2 Performance Standards and other forms of communications to the W-2 agencies. However, up until now, language on "light touch" and "diversion" has continued to exist in both the W-2 Philosophical Statements and the W-2 Policy Manual, making the program's priorities appear somewhat inconsistent. To remedy this, language pertaining to "light touch" and "diversion" is being removed. A new philosophy emphasizing "informed choice" has been developed and will be incorporated into sections of the W-2 Policy Manual and the W-2 Philosophical Statements.

At its most basic level, the “informed choice” philosophy means that our customers are provided with sufficient information about all employment related programs and services that are available to make an informed choice about which programs or services may meet their needs. This is a critical part of the responsibilities of the Receptionist and the Resource Specialist. Asking the appropriate questions and sharing accurate and thorough information when the customer first enters the agency will ensure that s/he is connected with the needed employment-related assistance upfront and potentially prevent the need for more intensive services in the future.

W-2 Philosophical Statements

The Seventh W-2 Philosophical Statement was revised to reflect the new “informed choice” philosophy. The old and new language is presented below to allow you to take note of the changes.

Old Language:

The new system should provide only as much service as an eligible person asks for or needs.

Many persons will do much better with just a light touch.

W-2 commits resources to providing supportive services to ensure participants employment at the highest level possible, to the extent that they need and desire these services. W-2 allows flexibility to devote funds to supportive services based on need.

New Language:

The level of W-2 services offered to eligible individuals is based on a functional assessment.

W-2 provides funds for services in support of employment. When given adequate information about the employment services for which they may be eligible, individuals will make an informed choice about whether or not to pursue those services.

Food Stamps and Medicaid remain entitlement programs with distinct funding sources and eligibility criteria.

W-2 Policy Changes

The W-2 policies that are most impacted by this change in philosophy are the responsibilities of the Receptionist and Resource Specialist found in Chapter One of the W-2 Policy Manual. Following is the revised policy:

Receptionist: The Receptionist is generally the first person to meet with the customer entering a Job Center or W-2 agency. When a customer approaches the receptionist, they should first be given the opportunity to ask for information about a specific program or service. For those customers who are not familiar with the programs or services available through the Job Center,

the receptionist must consider all Job Center programs that may potentially serve them and provide information on each. This ensures that the customer will make an informed choice about which programs and services to pursue. If the customer wishes to apply for or indicates an interest in learning more about the W-2 program, the receptionist will schedule an appointment with a Resource Specialist (RS) the same day or no later than the following working day.

Resource Specialist (RS): The role of the Resource Specialist is to assist each customer of the W-2 agency in determining which programs or services are likely to support their efforts at employment and self-sufficiency. In fulfilling this role, the RS will perform these primary functions:

- 1) Inform each customer about:
 - a) Services that are available through the W-2 program including employment position placements, case management services, and supportive services. The customer must be made aware that the provision of W-2 services is based on eligibility criteria and a functional assessment by W-2 agency staff.
 - b) Job Center partner programs such JobNet, WAA, WIA, WtW and DVR.
 - c) Supportive service programs such as Food Stamps, Medicaid, Child Care, Emergency Assistance, the Women, Infants and Children (WIC) benefit, the Low Income Heating Energy Assistance Program and local housing assistance programs.
 - d) Community resources offered through the Children Services Network, based on needs identified through the initial review process.
- 2) Perform the initial review of need for employment-related services. This will include:
 - a. Asking customers about the type of employment assistance they are interested in receiving.
 - b. Gathering basic information about the customers' recent job search efforts, employment skills, work history, education, income and assets.
 - c. Determining how the family/household composition and circumstances affect the customers' ability to work.
 - d. Assessing current child support case status.
 - e. Screening for priority status.
3. After providing information to the customer about available programs and services and gathering information through the initial review, assist the customer in determining what programs and services are likely to support their efforts at employment and self-sufficiency, including:
 - a. Utilizing the programs and services of the Job Center partners to receive job search assistance, work training opportunities, education and training opportunities or job retention and advancement services;

- b. Determining if there are other public assistance programs or resources that may address the financial need of the participant. Examples include: Supplemental Security Income, Unemployment Insurance, Food Stamps, Medicaid and local housing assistance;
- c. Applying for assistance through the W-2 program.

The RS must refer the customer to any programs in which there is an interest indicated. If, at this point, the customer expresses an interest in applying for W-2, the RS must initiate the interactive interview using the W-2 application to record nonfinancial and financial information such as income, assets, job history, education and family composition.

As a condition of W-2 eligibility, the RS may:

1. Assign job search to all persons who are clearly able to conduct a productive job search during the period of time the application is being processed; An Employability Plan must be developed when up-front job search is assigned. (See 5.1.2)
2. Require the applicant to apply for other appropriate public assistance programs or resources.

Applicants who wish to pursue W-2 after meeting with the RS must be referred to the FEP. The RS must explain the child support program. The booklet Wisconsin's Child Support Program and the "Child Support and You--100% Pass-Through" pamphlet must be given to the applicant. The RS must explain the child support requirements for all appropriate individuals, including noncustodial parents and pregnant women. Explain the requirement to cooperate with child support efforts and provide the applicant with and explain the Good Cause Notice and Good Cause Claim forms. See Chapter 16 for more information on Child Support requirements.

At no point does the RS determine final eligibility or placement in a W-2 employment positions. These are the responsibilities of the FEP based, in part, on the information collected by the RS. Applicants who only request supportive services may be referred to the Supportive Services Planner (SSP). All applicants will be referred to the Child Support program via the CARES/KIDS automated interface.

W-2 Participant Flow: Attached is the *W-2 Participant Flow and Access to Services Model*, which has been modified to reflect the Resource Specialist's responsibility to make referrals to other Job Center Services as needed.

MANUAL CHANGES

The revised *W-2 Participant Flow and Access to Services Model* along with the policy changes described in this memo will be included in the next release of the W-2 Manual.

CONTACTS

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BIMA CARES Information & Problem Resolution Center

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Note: Email contacts are preferred. Thank you.

ATTACHMENT

W-2 Participant Flow and Access to Services Model

W-2 Participant Flow and Access to Services Model

